

- Good Morning
- I'm Aaron Mason, I'm here to talk to you about the Survey Request Form & follow-up communication between designers and Survey

A little bit about me:

5 years at a Bozeman surveying firm.

Boundary survey/Subdivision design & layout/construction surveying

Spent a lot of time as a surveyor fixing engineers "mistakes", so I thought "I bet I could do that".

Bachelor Degree from MSU in Civil Engineering, Minor in Land Surveying.

MSU/MDT Design Unit

3 years in Helena - Road Design (Missoula District)

- So why was I given the opportunity to give this class
- I have worked on both sides of the fence:
   Surveying/Engineering
- I spent 5 years with a surveying firm in Bozeman, and spent so much time fixing engineers "mistakes" at a certain point I decided I think I could be a pretty good engineer.
- At 37 years old I earned a degree in Civil Engineering with a Minor in Land Surveying from MSU
- While at MSU, I was hired to work @ MSU/MDT Design Unit
- When I graduated I was then hired on here in Helena in Road Design working for Bill Squires, Missoula District, crew

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# Lessons I have learned from my time in MDT Road Design

(not always the easy way):

- We need a solution more than we need to complain about the problem.
- No design happens in a vacuum.
- Road design is extremely iterative, be prepared for things to change.

(... and then possibly change back to what you originally proposed)

- So before I really get into the presentation I would like to set some groundwork with a few key lessons I have learned here at MDT, usually the hard way.
- This first point really applies to everything in life, "We always need a solution more than we need to complain a problem" – in a way that why we have conferences and training like this
- Secondly, projects and designs are produced by a TEAM, everyone has some level of ownership and input, designs do not happen in a vacuum
- Lastly, expect change, and then possibly for things to change back to what you originally proposed. Don't fall in love with one idea, stay flexible.

"The single biggest problem in communication is the illusion that is has taken place."

- G. Bernard Shaw

- So this presentation is supposed to be about the survey request form, but the reality is that it is really about communication.
- This quote really made me think how people often mistake a report or a request form as communication, they are documentation not COMMUNICATION.

What is effective communication?:

Communication is not what you say, but what a listener understands.

Effective communication could be simply defined as shared understanding.

Most importantly effective communication is a two-way process.

- Throughout this presentation I will be using the phrase "effective communication" so I better provide a definition
- [Read and Highlight slide points]
- Why is effective communication so important?
- A recent national study found that 86% of employees cited a lack of collaboration and ineffective communication for workplace failures.
- I actually believe that might actually be a little low

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Purpose:

Completing the Survey Request Form

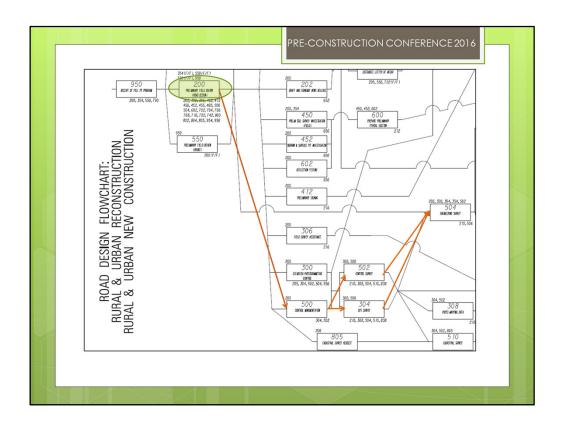
Initiation of dialog between designer and Surveying
Focus on Engineering Survey request from Road Design standpoint – my experience

Importance of effective communication
Designer/Surveying

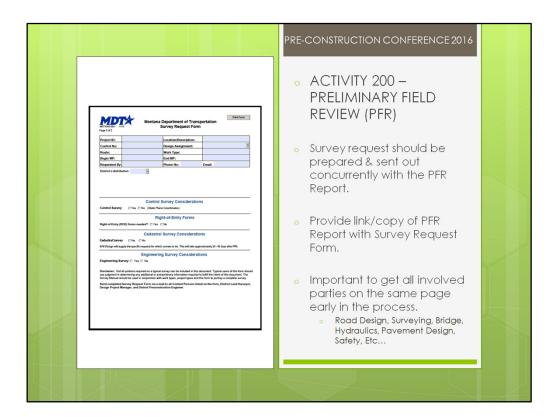
Limiting need for multiple pickup surveys
Spending more time up front preparing request
Did I mention communication?

- With the groundwork set my purpose here today is:
- 1) Process of completing the survey request form
  - This is truly the initiation of the dialog between a designer and survey
  - As a note I will be using the word designer to describe Project Managers, Engineering Specialists, Designers or anyone from any department who is actually making a survey request.
  - I will be approaching this from my experiences in Road Design
- 2) Emphasize the importance of effective communication
- 3) And Finally, as a goal, we should really all be trying to limit the need for additional pickup surveys. This can be aided by making sure we spend the necessary time up front preparing the request.

• Oh yeah... Did I mention communication



- This is a small portion of the Road Design flowchart for a reconstruction project.
- There is no exclusive activity or activity description that includes the direction as to when you prepare an intial survey request
- CLICK
- So when do we prepare a request...
   Activity 200: Preliminary Field Review.



- There is important information in a PFR Report that can assist survey in completing their work, such as a proposed scope of work.
- So a PFR Report should be included with an initial survey request
- For many reasons it is important to get all of the members of a design team involved in the process early.
- Early input can prevent late game frustrations, you never know if Hydraulics, Utilities, or Geotech for example might end up really driving a design.
- From a survey request standpoint having inputs from the other departments can help you cater your request to ensure special areas are surveyed early.

			CONSTRUCTION CONFERENC	JL 2010	
	ey Request I out the header				
Project ID:		Location/Description:			
Control No:		Design Assignment:	Missoula - Helena		
Route:		Work Type:			
Begin MP:		End MP:			
Requested By:		Phone No:	Email:		
District e-distrib					
Bryce Larsen, Pho Mark Roedel, Sur		William Weber, Helena S Maureen Walsh, District I			
Suzan Foley, Righ		Robert Vosen, District Co			
KC Yahvah, Hydra	aulics	Shane Stack, District Pre	construction Engineer		
	information need ch info available		PFR Report		
o The "F Desig	The "Requested By:" info should be the contact person from Road Design (i.e. project manager/design supervisor/designer)				
o Begin Map	gin/End MP for survey can be obtained on MDT Spatial Data ap (MDT GIS), as-builts, or from planning (Marisa Mailand).				

- Lets spend a little time looking at the actual form
- ...and even if you don't actually complete these forms yourself it's good exposure. And you never know when you might become the new Road Design Area Engineer for the Butte District.
- So, filling out the header, most of the information for the header can come directly from the PRF Report.
- The distribution list and contact persons in other portions of the request are auto populated based on the selection of design assignment and district.

Control Survey Considerations  Control Survey @Yes No (State Plane Coordinates)  Contact Person (Helena Survey):  Bill Weber  Contact Person:  A control survey is required for basically Mark Roedel, Survey  every project (Road Design).  Details:	
Contact Person (Helena Survey):    Bill Weber	
Bill Weber   A control survey is required for basically   Mark Roedel, Survey   every project (Road Design).	
Contact Person:  A control survey is required for basically Mark Roedel, Survey  every project (Road Design).	
Mark Roedel, Survey every project (Road Design).	
Details:	
Right-of-Entry (ROE) forms needed? • Yes • No Right-of-Entry forms to be obtained by:  District Survey  Contact Person:  ROE required if requesting survey outside of R/W. Be realistic with anticipated construction limits.	
Maureen Walsh, District R/W Supervisor	
Contact District RW Supervisor for a list of landowner information if needed. Survey crew may coordinate with District R/W to secure ROE forms if more expedient. Completed right-of-entry forms to be scanned and posted on DMS by survey crew using ROE designation. Send original right-of-entry forms to Shane Stack, District, Preconstruction	
Engineer. Signed right-of-entry forms are to be kept in the District Project Files.	
Engineer. Signed right-of-entry forms are to be kept in the District Project Files.	
Engineer. Signed right-of-entry forms are to be kept in the District Project Files.  Cadastral Survey Considerations	
Engineer. Signed right-of-entry forms are to be kept in the District Project Files.  Cadastral Survey Considerations  Cadastral Survey @Yes © No	ition

- The form is designed so as you answer "yes" in a given section it expands for the additional needed information.
- The contact persons in these areas is what was auto-populated from the design assignment selection
- The next sections are:
  - 1) Control survey which is basically required on every Road Design project needing a survey.
  - 2) Right of Entry Forms, which is required if requesting any survey outside of R/W, and remember, be realistic with what you are anticipating the construction limits to be.
  - 3) Cadastral Survey, again if R/W acquisition is anticipated

	PRE-CONSTRUCTION CONFERENCE 2016  • Engineering Survey  Considerations	
Engineering Survey & Yes C 10  DITAl Planeiron's Survey & N'Yes C 10  Blot: Contact trition Photogrounneity & Survey (Bryos Lawen - 444-6221, Bill Velder - 444-6222) for assistance  Area of Survey Produpmenterly, LOIA, etc.) & Yes C 100  Contact Person Photom Survey;  Byte Carea  Ontolophotes:	<ul><li>DTM / Planimetric Survey</li><li>Aerial Survey</li></ul>	
Details:  Field Skreys (Grand Surver) Contact Person:  Alignment Cross Sections:  Pictup Survey:  Details:	Field Survey (Ground Survey)     Traditional Survey Methods     Additional Pickup Survey     Utility Survey	
Utility Survey (Locate al Utilities) # Yes   Too     Department Forces   S.M.E. Forces     Township   Flanger:     Default:     Default:     Hydraulica Survey   Yes # No     Wildowlo Survey   Yes # No	Hydraulics Survey     Drainage Survey     Bridge Survey     Irrigation Survey	
Docisimen: Not all portions equipped on a typical sourcy can be included in this document. Typical users of the home and the service of the property of the pr	<ul> <li>Urban Survey</li> <li>Wetlands Survey</li> <li>Stand-Alone Wetland Mitigation</li> </ul>	

- The next main Section is the Engineering Survey Consideration, which expands into:
  - DTM/Planimetric Survey Aerial Survey
  - Field Survey
    - Traditional field survey and additional pickup surveys
  - Utility Survey
  - Hydraulics Survey –
  - Wetlands Survey
    - Only for stand alone Wetland Mitigation projects

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Survey Request Form -Engineering Survey -DTM / Planimetric Survey	
Engineering Survey Considerations	
Engineering Survey   Yes  No  DTM / Planimetric Survey  Yes  No  Note: Contact Helena Photogrammetry & Survey (Bryce Larsen - 444-6321, Bill Weber - 444-6020) for assistance in the selecting the engineering survey method(s) to be used.	
Aerial Survey (Photogrammetry, LiDAR, etc.)	
Orthophotos: Details:	

 So based on my experiences, I would like to focus in on the aerial survey requests and just provide some reminders...

Survey Request Form
-Aerial Survey Reminders

O 2 flight seasons: Mid-March & Late Sept. – Late Oct.

O 30 degree sun angle prefered

Bryce usually sends advanced reminder, but keep seasons in mind for scheduling

Photogrammetry vs. ground survey

Obvious problems in timbered areas

\$29/acre for photogrammetry vs. \$300+/acre for ground survey

Be very liberal in request limits

Get everything you need with first request

- When anticipating the use of aerial survey, for scheduling purposes, remember there are 2 flight seasons. The first is in Mid-March and the second is from Late-September to Late-October.
  - Reason is tied to a preferred sun angle of 30 degrees, which limits hot spots from developing in the aerial photographs.
  - Also limits the amount of ground vegetation
- Bryce usually sends out reminder in advance of seasons, but keep seasons in mind.
- There is no such thing as a 100% aerial survey, there is still always going to be some level of traditional ground survey (obstructed areas, culverts & drainage features, x-section checks)
- The cost for aerial survey is estimated around \$29/acre and the ground survey ranges from \$300 to \$10,000 acre

so be very liberal in the request survey limits

Survey Request Form
-Aerial Survey Reminders (cont.)

O Does the project match the survey method

i.e., several mile Rural Reconstruct or Slope Flattening in open terrain good candidate

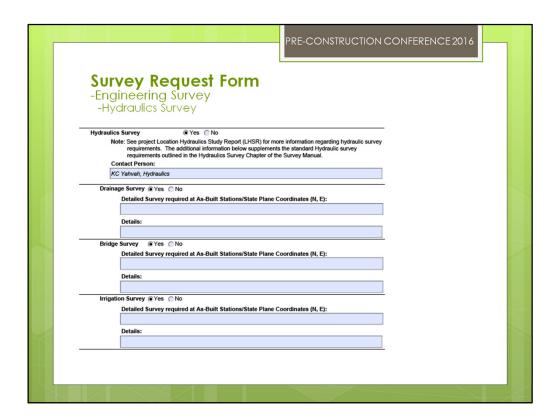
Ask, Bryce is always happy to help

More accurate aerial survey can be obtained

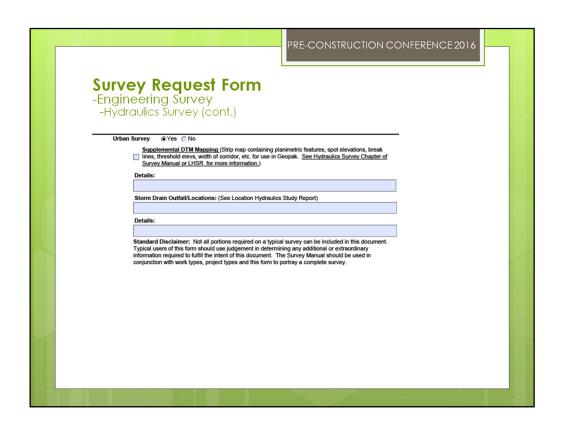
lower flight path

The key to ensuring delivery of a quality survey is effective communication. Survey can't read your mind, but they can read your request.

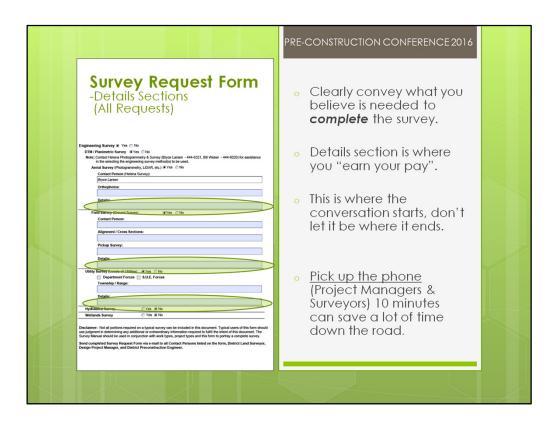
- The are types of projects & locations that are ideal candidates for aerial survey.
- The absolute best resource to determine if a project is a good fit for aerial survey is Bryce in Survey. He is happy to help, so please contact him while your preparing your request.
- There are types of projects that you may not be aware can use aerial survey, so if there is a doubt, ask.



- Now expanding some of the areas under the Hydraulics Survey section...
  - Drainage
  - Bridge
  - Irrigation...

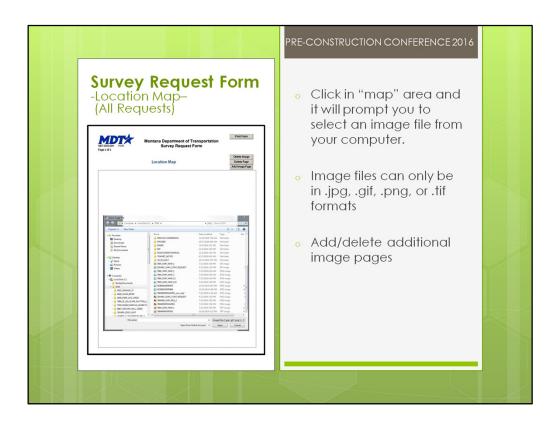


- ...and Urban Surveys
- I really have no experience with filling out a Hydraulics Survey Request, but all types of requests share a common section, the Details Section...



- CLICK
- CLICK
- CLICK
- The Details Section should convey everything you believe is needed to complete the survey.
- Do not short yourself or survey in this area, this is where you earn you pay, spend the time on it that it deserves.
- After submitting a request if there is anything that needs clarification, PICK UP THE PHONE
- Remember effective communication means mutual understanding, don't just send an email and assume that's enough
- A 10 minute phone call can save a tremendous amount

of time and prevent frustrations



- The final section of the request form is the location map
- Simply click in the Location Map area [Click], and it will prompt you to add an image from your computer.
- You can only use a select number of file formats
- If your having difficulty adding what you want due to format issues, I promise there is a computer whiz on your crew that can help...
- Also the Snipping Tool can help you grab just about anything you want and put it in the format you need.

Survey Request Form
-Details & Location Map

Nothing is better than a picture, expand/compliment written Details Section with photos, maps, etc.

Use multiple resources: PFR/site photos, Google Maps/Street View, MDT GIS Maps, Pathweb, As-builts, etc...

- The location map should be used in conjunction with your details section to provide additional clarity. A combination of the two can really help ensuring you have effectively communicated your needs.
- This section doesn't need to be just a map
- We have a tremendous amount of resources at our disposal
- MDT GIS Maps, MDT Route Location Finder App can be found in the TIS Application section on our INTRANET page
- I will be sharing some examples of survey requests that combine the written section with additional photos and maps, but first I would like to ask a question...

Question ?

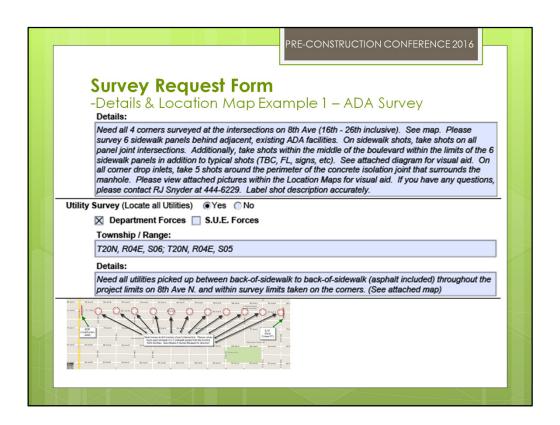
o How often are we requesting additional pick-up survey on projects involving ADA design?

- So how often are additional pick-up surveys being requested on projects that involve ADA design?
- Or really for that matter, how often are we just "making due" with the survey we do receive on these projects.

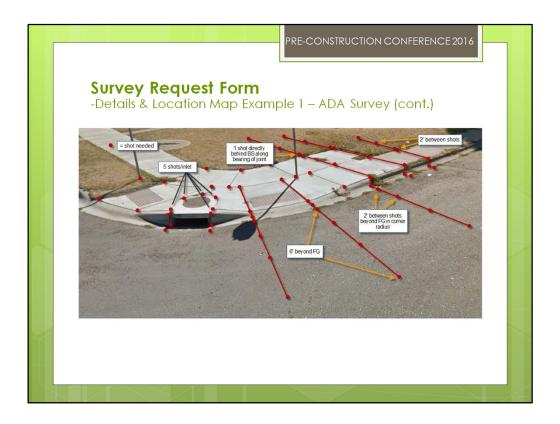
Remember...

o We need a solution more than we need to complain about the problem...

 With survey requests involving ADA design in mind, I have included an excellent example of a survey request provided by R.J. Snyder



- I would like to read what R.J, included in his written request
- [CLICK]-Area Expands
- Read portion of request
- After hearing RJ's written Details Section I'm sure you agree it is clear & concise, but RJ wanted to ensure he effectively communicated his needs so he added some additional pictures.



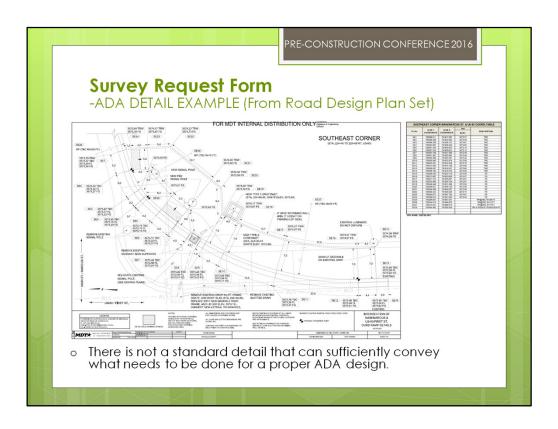
- Here we see requested shots on each sidewalk panel intersection
- Along panel lines @ the TBC, FL, FG
- There is also additional shots being requested in the radius
   6' beyond the FG in 2' increments
- Extra shots are really needed in the radius, because the grades usually are getting altered the most at the ramps and we need to remove and warp the asphalt and curb accordingly



- More often than not, there is at least an attempt to preserve existing drainage features.
- So any drainage features like curb or drop inlets need to be fully defined to help determine if any adjustment is going to be necessary



- Here we see midpoint shots in the boulevard, because there is always a possibility of a sidewalk being widened, or a corner being expanded to correct a landing or ramp
- There is also the possibility of being able to accommodate a pedestrian push button
- So why does a designer need such an intense survey?
- The reason is because you have to go through the design process to determine the controlling elements



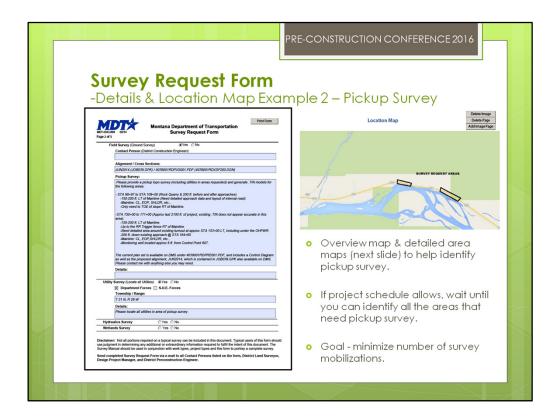
- I also want to be very clear about this:
- HAVING A "COMPLIANT" DESIGN DOES NOT MEAN YOU HAVE A "GOOD" DESIGN
- This is also one of the very few types of project that is tied to a Federal Law
- Design Speeds, HZ or Vertical curves or really any of our controlling design criteria for Highways are not directly dictated by Federal Law
- There is no way a standard detail can be sufficiently convey a proper ADA design, this is especially true when we are going in and fixing existing facilities.
- Here is an example of the final produced plans for one corner [Expand on what was being done]

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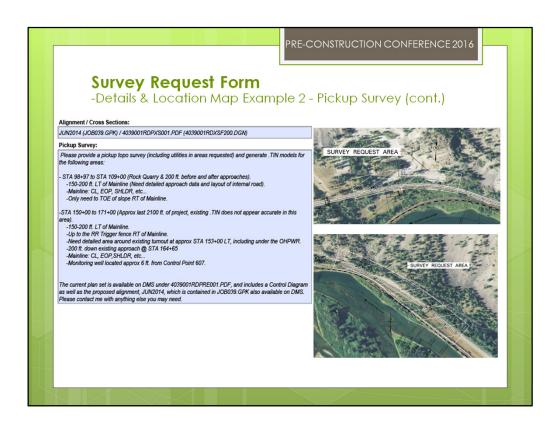
#### **Survey Request Form**

-ADA Design

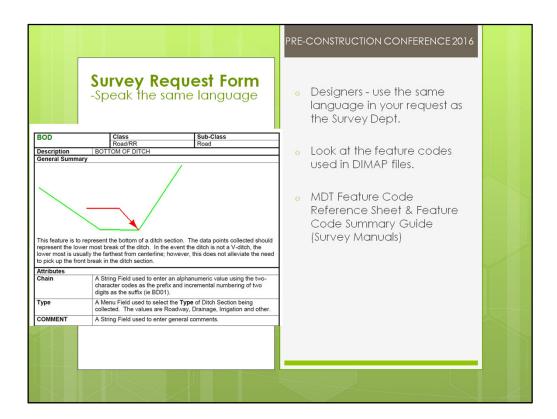
- Designers What do you need to show in the plans to convey your design?
- Reality Design are not constructed to perfectly match designed coordinates/elevations, you are trying to convey relative grades, grade breaks, radius points, PC's/PT's, lengths, and relationships between design elements.
- Surveyors A good way to break down effective/open communication is to express this sentiment, "Do you really need all of this information?"
- So designers what do you need to show in your plans:
  - ADA Plans should not express design elements with minimum/maximum grades or widths
  - Short Answer Everything
- I completely understand projects are not constructed perfectly to match our designs, but much like we can't know what controls the design before going through the process, we can't pre-determine when relative grades will be used
- As a construction surveyor I believed I could never have TOO much information
- Surveyors "Do we really need all of this information?"
- YES
- We are asking for entire point clouds from lidar



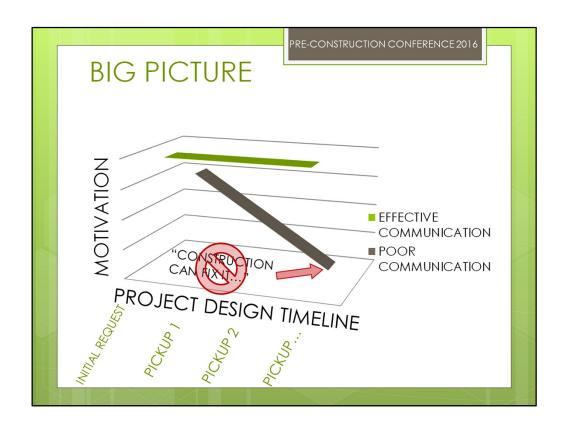
- Here is an example of a pickup survey request
- The main goal, with respect to pickup surveys, is to identify all of the areas you might need additional information and then send out the request
- Here is an overview map I prepared...



- And then I provided further detailed maps of each area at each specific locations
- [READ PICKUP REQUEST AREA]
- When requesting a pickup survey try to provide the surveyor information on all of you current design alignments and .GPK's
- Also sometimes providing a little justification or back story in the request or over the phone as to why your sending a crew back to a location can help alleviate any possible frustration
- In this case a rock quarry had been altering approaches and built an internal road that could have conflicted with the design



- It is important to use clear/concise language in your request
- An excellent way to do this is to use the same language in your request that Survey uses
- Designers look at any of your DIMAPs or...
- On the INTRANET in the Survey Manuals look and the MDT Feature Code Reference Sheet and accompanying Summary Guide
- [CLICK]
- The summary guide gives the instructions of exactly what is being located for each feature



- So BIG PICTURE for any project, if we can maintain a high level of motivation throughout the design process we end up with a better product for the public in the end
- We also help build a stronger more enjoyable workplace
- An excellent way to maintain that motivation is through effective communication
- Remember this is MUTUAL UNDERSTANDING, not MUTUAL AGREEMENT there are many things we just don't have control of or input into
- [CLICK]
- From a Survey Request standpoint, we can get to a point through poor communication where we have demotivated the survey crew or the designer ...
- We can end up at a place where we say: [CLICK] "Construction can fix it"
- [CLICK]
- This is absolutely not where we want to end up

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#### Parting Thoughts...

- The survey is the most important piece of design information a designer will receive, no such thing as too much information.
- The Survey Request Form is only the initiation of communication, open dialog ensures a quality product is delivered.
- Project Design 101 The more time you spend in the early stages the less likely we end up at "Construction can fix it".
- So in conclusion I have a few parting thoughts...
- The survey is the most important piece of design information we will receive, there is no such thing as TOO much information
- The request form is only a form of documentation it does not guarantee communication
- Spend more time in the early stages of a project working through the difficulties, because the last place we want to end up is "Construction can fix it"

